

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

2018 NOV 13 PM 4:04

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Software Education Foundation d.b.a. Software.org: the BSA Foundation

Travel date(s): 22-24 October 2018

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$697.65	\$367.00	\$172.91	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

See attached Final Agenda

11/13/2018
(Date)

William C. Cook
(Printed name of traveler)

[Signature]
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

11/13/2018
(Date)

[Signature]
(Signature of Supervising Senator/Officer)



Day 1 (Monday, October 22)

6:30 AM Meet at gate, Ronald Reagan International Airport (DCA)

8:05 AM EST United Flight 2042 from DCA to San Francisco International Airport (SFO)

11:00 AM PST United 2042 arrives at SFO

12:00 PM Bus transport to Salesforce.

12:30 PM **Salesforce – Lunch Served at Salesforce**
Location: 350 Mission Street

At Salesforce, attendees will meet with Eric Loeb, EVP for Policy, and Taher Elgami, CTO, Security, for an in-depth conversation about the company's approach to cybersecurity, the threat landscape, and the role of public policy in promoting stronger cybersecurity solutions.

2:30 PM Depart Salesforce. Bus transport to Adobe.

3:00 PM **Adobe**
Location: 601 Townsend Street, San Francisco

During the visit to Adobe, the delegation will meet with Brad Arkin, the company's Chief Security Officer, to discuss the cyber threat landscape and how public policy impacts cybersecurity programs.

4:00 PM Depart Adobe. Bus transport to IBM.

4:30 PM **IBM**
Location: 425 Market Street, San Francisco

During the visit to IBM, attendees will meet with the companies leading cybersecurity experts for an in-depth conversation on the cybersecurity environment and how IBM solutions, such as cognitive cybersecurity technologies, are helping companies stay secure. Attendees include Wendi Whitmore, Global Partner and Director, IBM X-Force Threat Intelligence, and Mitch Mayne, Public Information Officer, IBM X-Force Threat Intelligence.

5:30 PM Depart IBM. Bus transport to Bistro Boudin

6:00 PM Arrive at Bistro Boudin

6:00 PM **Dinner with Siemens Head of Cybersecurity**
Location: Bistro Boudin, 160 Jefferson Street, San Francisco

Over dinner at Bistro Boudin, attendees will engage in a detailed conversation on Siemens's approach to cybersecurity with Leo Simonovich, VP and Global Head, Industrial Cyber and Digital Security.



8:00 PM Dinner concludes. Attendees depart for Sunnyvale Hotel
Holiday Inn
Location: 852 W El Camino Real, Sunnyvale, CA 94087

9:00 PM Arrive at Sunnyvale Hotel.

Day 2 (Tuesday, October 23)

9:00 AM Group meets in hotel lobby.
Bring luggage to lobby and please check out.
Breakfast served in hotel lobby. Bus transport to Apple.

9:30 AM **Apple**
Location: 2 Apple Park Way, Cupertino, CA

During the visit to Apple's campus, attendees will meet with company executives for an in-depth conversation about the company's approach to cybersecurity, the current threat landscape, and public policy's impact on digital security. Ivan Krstic (Head of Security Engineering and Architecture) and George Stathakopoulos (VP of Corporate Information Security) will be speaking with the group.

11:00 AM Depart Apple. Bus transport to DIU.

11:30 AM **DIU – Lunch Served at DIU**
Location: 230 R.T. Jones Road, Mountain View, CA

At DIU's Mountain View headquarters, attendees will meet with DIU leadership to discuss the organization's mission and work. DoD established DIU to accelerate commercial innovation to the warfighter in order to meet the changing demands of today's strategic and technological environments. It is2 DIU's mission to lead DoD's break with past paradigms of military-technical advantage to become fast adapters -- as opposed to sole developers -- of technology, integrating the advanced commercial capabilities necessary for strategic advantage. In this hyper-competitive environment, DoD is moving to prioritize speed of delivery, rapid and modular upgrades, and quick operational adaptation on the battlefield. The delegation discussion will include a focus on cybersecurity and artificial intelligence, as well as a tour of the department's current work on counter Unmanned Aerial Systems. Attendees include Director Michael Brown; Ajay K. Amlani, CEO in Residence; Pavneet Singh, Defense Innovation Unit; Mike Kaul, Artificial Intelligence and Machine Learning Portfolio Lead; Zach Walker, IT Portfolio Lead, Austin Unit; Captain Rachel Kolesnikov-Lindsey, Space Portfolio; LtCol Mark Jacobsen, Program Manager, Rogue Squadron; and Jameson Darby, Autonomy Portfolio Lead.

1:30 PM Depart DIU. Bus transport to FireEye.

2:00 PM **FireEye**
Location: 601 McCarthy Blvd, Milpitas, CA 95035

At FireEye, attendees will meet with FireEye experts and executives to discuss the company's three-prong business structure and approach to cybersecurity. Speakers included Kevin Mandia, CEO; Vasu Jakkal, Chief Marketing Officer, FireEye; Ben Forster, Product Marketing Manager; Sean Underwood, Intelligence Principal, Government Accounts; and Charlie Baisley, Director of Strategic Alliances and Government Affairs.



3:30 PM Depart FireEye. Bus transport to Symantec.

4:00 PM **Symantec**
Location: 370 Ellis Street, Mountain View

Attendees will meet with Symantec executives for an in-depth conversation on the company's approach to cybersecurity and the cybersecurity landscape. Attendees include Steve Trilling, Senior Vice President and General Manager, Security Analytics and Research.

5:30 PM Depart Symantec. Bus transport to dinner with Workday.

6:30 PM **Dinner in Silicon Valley**
Location: Trader Vics Emeryville

Josh DeFigueiredo, Vice President, Chief Information Security Officer at Workday, had been invited to speak, but unfortunately had to cancel.

8:00 PM Depart dinner for Oakland Hotel – Inn at Temescal

8:30 PM Arrive at Inn at Temescal
Location: 3720 Telegraph Avenue, Oakland, CA 94609

Day 3 (Wednesday, October 24)

7:45 AM Group meets in hotel lobby. Bus transport to Microsoft.
Bring luggage to lobby and please check out. Takeaway breakfast served in hotel lobby

8:30 AM **Microsoft**
Location: 1355 Market Street, San Francisco

During the visit to Microsoft, attendees will meet with top cybersecurity officials for an in-depth conversation about the company's approach to cybersecurity and the company's defending democracy program. Invited Microsoft speakers include Kate O'Sullivan, General Manager, Digital Diplomacy; Jan Neutze, Director of Cybersecurity Policy, Digital Diplomacy; and Jamal Edwards, Policy Program Manager, Digital Diplomacy.

9:30 AM Depart Microsoft. Bus Transport to Okta.

10:00 AM **Okta**
Location: 300 Brannan Street, San Francisco

At Okta, attendees will meet with the company's senior cybersecurity executives to discuss the cyber threat environment, enterprise ID management, and access management, among other things. Speakers include Yassir Abousselham, Chief Security Officer for Okta, and Jon Runyan, General Counsel for Okta.



11:00 AM Depart Okta. Bus transport to SFO.

12:00 PM Check in at SFO.

1:15 PM PST United Flight 2046 from SFO to DCA.

9:30 PM EST United Flight 2046 lands at DCA.

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):
The Software Education Foundation d.b.a Software.org: the BSA Foundation ("Software.org")
2. Description of the trip: An educational visit to software companies to provide a better understanding of the software industry's approach to cybersecurity
3. Dates of travel: October 22, 2018 - October 24, 2018
4. Place of travel: Sunnyvale and Oakland, CA (with site visits throughout the San Francisco Bay Area)
5. Name and title of Senate invitees: See attachment
6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

OR

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Software.org is the sole sponsor and organizer for this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This is Software.org's sixth trip for Congressional staff. Software.org co-sponsored a trip in 2018 for

Senate staff. This is the first trip for Senate staff for which Software.org is the sole sponsor.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Software.org educates policymakers, stakeholders, and the general public through meetings and briefings and by developing and publishing studies and papers that explain policy, new technologies, and other topics of the interest to the software industry.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$815.15	\$367	\$190.00	None
<input type="checkbox"/> Actual Amounts	(\$440.15, airfare; \$375, coach bus transportation)	(\$208 Sunnyvale; \$159 Oakland)		

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves events that are arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Software.org chose San Francisco due to the number of software companies with major offices located in close proximity, allowing Software.org to better showcase the industry's approach to cybersecurity.

19. Name and location of hotel or other lodging facility:

Holiday Inn Sunnyvale, 852 W. El Camino Real, Sunnyvale, CA 94087
Inn at Temescal, 3720 Telegraph Ave., Oakland, CA 94609

20. Reason(s) for selecting hotel or other lodging facility:

The locations were chosen because their rates met the daily per diem rates for the jurisdictions in which they are located.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The daily expenses for lodging and meals will be below the daily per diem rates for Sunnyvale and
Oakland, California.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round-trip coach airfare from Washington, DC (DCA) to San Francisco (SFO); ground transportation will
be provided by coach class charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

none

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: 

Name and Title: Chris Hopfensperger, Executive Director

Name of Organization: The Software Education Foundation d/b/a Software.org: the BSA Foundation

Address: 20 F Street, NW, 8th Floor, Washington, DC 20001

Telephone Number: 202-530-5135

Fax Number:

E-mail Address: chris@software.org

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: William Christopher Cook

Employing Office/Committee: Senate Appropriations Committee

Private Sponsor(s) (list all): Software Education Foundation d.b.a. Software.org; the BSA Foundation

Travel date(s): 22-24 October 2018

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Sunnyvale and Oakland, California (San Francisco Bay Area)

Explain how this trip is specifically connected to the traveler's official or representational duties:

Educational visit to software companies to discuss the cyber threat landscape and private sector approaches to cybersecurity that could positively impact future legislation and funding priorities of the Department of Homeland Security (DHS). Traveler is responsible for providing oversight in these same areas within DHS and its operational and support components to include DHS Analysis & Operations (A&O) and the Office of Intelligence and Analysis (I&A), and the National Protection and Programs Directorate (NPPD) for cyber activities.

Name of accompanying family member (if any): None

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

10/4/2018
(Date)


(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Richard Shelby hereby authorize William Christopher Cook
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

10/4/2018
(Date)


(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

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Name of Traveler: William Christopher Cook

Employing Office/Committee: Senate Appropriations Committee

Private Sponsor(s) (list all): Software Education Foundation

Travel date(s): 22-24 October 2018

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): San Francisco

Explain how this trip is specifically connected to the traveler's official or representational duties:

Educational visit to software companies. Traveler is responsible for Department of Homeland Security cybersecurity oversight.

Name of accompanying family member (if any): None

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/21/2018
(Date)


(Signature of Employee)


TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Richard Shelby hereby authorize William Christopher Cook
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/21/2018
(Date)


(Signature of Supervising Senator/Officer)

Cook, Chris (Appropriations)

From: Cook, Chris (Appropriations)
Sent: Tuesday, July 10, 2018 1:32 PM
To: 'Dori Friedberg'
Subject: RE: Staff Del

Sure, how does maybe around 3pm sound?

From: Dori Friedberg <dori@software.org>
Sent: Tuesday, July 10, 2018 1:19 PM
To: Cook, Chris (Appropriations) <Chris_Cook@appro.senate.gov>
Subject: Staff Del

Hi, Chris – I don't think we've met yet. I just came over from the Senate side to help BSA stand up a new foundation.

I'm putting a staff del together for senior committee and leadership staff, and was hoping to catch you quickly to get your take as we are still shaping it and – in hopes you want to join – plan it for a good time for you.

Do you have a few minutes for a phone call today or tomorrow?

Thanks in advance. Dori

Dori Friedberg
Senior Director
202-530-5172



(Handwritten note: I expressed interest in attending a TBD trip but did not commit during this call.)

Cook, Chris (Appropriations)

From: Dori Friedberg <dori@software.org>
Sent: Tuesday, September 18, 2018 2:51 PM
To: Kuiken, Michael (Schumer); Dressler, Jeff; Parker, Wyndee; 'Daniel Silverberg'; Leonard, Rob (Durbin); Glabe, Scott; Day, Patrick (Judiciary-Dem); Parmiter, Robert; Graupensperger, Joe; Lips, Dan (HSGAC); Klein, Julie (HSGAC); Bergin, Moira; Cook, Chris (Appropriations); Olson, Andy (Foreign Relations); Iozzi, Mark
Cc: John Cameron; Andrea Mietus; Chris Hopfensperger; Dori Friedberg
Subject: Confirmation and Forms: Cybersecurity Delegation to San Francisco
Attachments: Software.org Staff Delegation Trip to SFO Attendee Information Form.xlsx; House Ethics Committee Primary Trip Sponsor Form - San Francisco 2018.pdf; Senate Ethics Committee Private Sponsor Travel Certification Form - San Francisco 2018.pdf; 091818 SFO Cyber Del Agenda.docx

Categories: Blue Category

Cybersecurity Senior Staff Delegation to San Francisco, CA October 22-24, 2018

Colleagues,

We are delighted you are able to join our Senior Staff Delegation to San Francisco, CA, October 22-24th. The trip will include a series of nuanced conversations with senior cybersecurity engineers at leading software companies and the U.S. DoD Defense Innovation Unit.

- 1) **Agenda:** Agenda attached. We will circulate an updated draft with additions and time adjustments before the trip. We have invited additional cybersecurity staff to join the delegation dinners.
- 2) **Flights:** Please return the attached flight information document by this Wednesday Before Noon. Include any flight adjustment requests as applicable.
- 3) **Bio:** Please submit your bio for the trip information packet. The packet will be disseminated to Congressional staff attendees, company staff the delegation is meeting, and DOD DIU staff.
- 4) **Ethics Paperwork:** Software.org will cover all approved costs associated with this trip including airfare, hotel expenses, and group meals. This trip has been structured to comply with House and Senate ethics rules. The necessary paperwork for submission to the House and Senate Ethics committees is attached. **The Committee deadline to submit paperwork to the House and Senate Ethics Committees is this Friday, September 21.**
- 5) **Pre-Trip Conference Call:** We are planning two, identical pre-trip conference calls to review the trip agenda and details. Let us know if one of the times does not work for your schedule.
 - Call Option 1: Monday, Oct 15th, 1 pm. Dial in: 888-340-5470, Access Code: 9782151
 - Call Option 2: Thursday, Oct 18th, 10am. Dial in: 888-340-5470, Access Code: 9782151
- 6) **Non-Disclosure Agreements:** Some companies will request meeting participants sign an NDA when entering their facilities. Please let us know if you have considerations or questions.

Please address any questions to John Cameron at johnc@bsa.org.

Sincerely,
Chris Hopfensperger
Executive Director, Software.org

Chris Hopfensperger
Executive Director
P 202.530.5135



About Software.org
Software.org: the BSA Foundation is a nonpartisan, 501(c)(3) research organization. Headquartered in Washington, DC, the foundation publishes studies that examine the intersection of software and society, and engages with policymakers and the public to inform policies that can stay ahead of cutting-edge technologies. The Foundation partners with policymakers and leading organizations to empower and expand the workforce of tomorrow, including efforts to attract underrepresented groups to the software workforce.



Day 1 (Monday, October 22)

7:00 AM Meet at gate, Ronald Reagan International Airport (DCA)

8:05 AM EST United Flight 2042 from DCA to San Francisco International Airport (SFO)

11:00 AM PST United 2042 arrives at SFO

12:00 PM Bus transport to Salesforce.

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Location: 1 Market Street, Suite 300

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Location: 601 Townsend Street, San Francisco

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4:00 PM Depart Adobe. Bus transport to Workday.

4:30 PM **Workday**
Location: 160 Spear Street, San Francisco

Attendees will meet with Workday's senior cybersecurity executives for an in-depth conversation on the company's approach to cybersecurity and the modern threat environment.

5:30 PM Depart Workday. Bus transport to Bistro Boudin

6:00 PM Arrive at Bistro Boudin

6:00 PM **Dinner with Siemens Head of Cybersecurity**
Location: Bistro Boudin, 160 Jefferson Street, San Francisco

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3:30 PM Depart Symantec. Bus transport to IBM.

4:00 PM **IBM**
Location: 1850 Gateway Dr #150, San Mateo, CA

During the visit to IBM, attendees will meet with the company's leading cybersecurity experts for an in-depth conversation on the cybersecurity environment and how IBM solutions, such as cognitive cybersecurity technologies, are helping companies stay secure.

5:30 PM Depart IBM. Bus transportation to dinner in the valley.

6:00 PM **Dinner in Silicon Valley**



7:30 PM Depart dinner for Emeryville hotel.

8:30 PM Arrive at Emeryville Hotel

Day 3 (Wednesday, October 24)

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4. Place of travel: San Francisco, California
5. Name and title of Senate invitees: See attachment 1
6. I certify that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

—OR—

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

—OR—

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

See attachment 2

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment 3

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment 4

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment 5

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$900.00 (Ground Transport & Airfare)	\$507.00	\$190.00	
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves events that are arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip:

Software.org chose San Francisco due to the number of software companies with major offices located in close proximity, allowing Software.org to better showcase the industry's approach to cybersecurity.

19. Name and location of hotel or other lodging facility:

Holiday Inn Sunnyvale, Hyatt House Emeryville

20. Reason(s) for selecting hotel or other lodging facility:

See attachment 6

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

See attachment 7

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round-Trip coach airfare from Washington, DC (DCA) to San Francisco (SFO)

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:

Name and Title: Chris Hopfensperger, Executive Director

Name of Organization: The Software Education Foundation d/b/a Software.org; the BSA Foundation

Address: 20 F Street, NW, 8th Floor, Washington, DC 20001

Telephone Number: 202-530-5135

Fax Number:

E-mail Address: chris@software.org

Instructions

(Do not file the Instructions with OPR.)

General Instructions

- The Senate Select Committee on Ethics ("Ethics Committee") has developed guidelines for evaluating privately-sponsored trips and for judging whether trip expenses are reasonable. Trip sponsors should consult the *Senate Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel*, including the *Glossary of Terms*, prior to filling out the *Private Sponsor Travel Certification Form* and contact the Ethics Committee at (202) 224-2981 with any additional questions. The Ethics Committee will make the final determination as to whether the expenses incurred during a privately-sponsored trip are reasonable.
- If there are multiple sponsors, they should jointly complete one *Private Sponsor Travel Certification Form* for the trip. Each travel sponsor should complete the signature block.
- When evaluating a trip proposal and judging the reasonableness of expenses, the Ethics Committee will consider the following factors:
 - a. the stated mission of the organization sponsoring the trip;
 - b. the organization's prior history of sponsoring congressional trips, if any;
 - c. other educational activities performed by the organization besides sponsoring congressional trips;
 - d. whether any trips previously sponsored by the organization led to an investigation by the Select Committee on Ethics;
 - e. whether the length of the trip and the itinerary is consistent with the official purpose of the trip;
 - f. whether there is an adequate connection between a trip and official duties;
 - g. the reasonableness of the total amount spent by a sponsor of the trip;
 - h. whether there is a direct and immediate relationship between a source of funding and an event;
 - i. the maximum *per diem* rates for official Federal Government travel published annually by the General Services Administration, the Department of State, and the Department of Defense;
 - j. whether travel to a location or event is arranged or organized without regard to congressional participation, or whether it is specifically organized for Congressional staff; and
 - k. any other factor deemed relevant by the Select Committee on Ethics.

Consult the *Senate Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel*, including the *Glossary of Terms*, for further discussion of these factors.

- Responses to each question should be brief, consistent with the requirement to provide all relevant information. Attach additional pages, as necessary.
- To allow sufficient time for the Ethics Committee to review requests for privately sponsored travel, the participating Senate Members, officers, and employees must submit the completed form to the Ethics Committee at least **thirty (30) days** before the date of the proposed trip.

Filling out the Private Sponsor Travel Certification Form (Question by Question Instructions)

1. *Sponsor(s) of the trip (please list all sponsors):* A sponsor of a trip is any person, organization, or other entity contributing funds or in-kind support for the trip. A sponsor must have a significant role in organizing and conducting a trip and must have a specific organizational interest in the purpose of the trip. If Members, officers, and employees are participating in an event or fact-finding trip in connection with their duties, they may accept necessary travel expenses only from the event or trip sponsor.
2. *Description of the trip:* Provide a brief statement about the purpose of the trip.
3. *Dates of travel:* Provide the dates of departure and return.
4. *Place of travel:* Provide the destination(s) for the trip.
5. *Name and titles of Senate invitees:* Provide the name and title for each Senate Member, officer, or employee who is invited on the trip.
6. *I certify that the trip fits one of the following categories:* A Senate Member, officer, or employee may accept privately sponsored travel only from sponsor(s) of a trip that fits one of the categories listed. Consult the instructions for question 9 to determine if the trip meets the lobbyist accompaniment standard.
7. *Financing of the trip, earmarked funds and in-kind contributions:* Senate Members, officers, and staff may not accept privately-sponsored travel funded by a registered lobbyist or foreign agent. Members, officers, and staff may not participate in privately-sponsored travel when the sponsors accept funds or in-kind contributions earmarked for this particular trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal. Earmarking includes any direction, agreement, or suggestion -- formal or informal -- to use donated funds, goods, services, or other in-kind contributions for a particular trip or purpose.
8. *Lobbyist/agent of a foreign principal involvement:* Senate invitees may not participate in trips planned, organized, arranged, or requested by a lobbyist or foreign agent in more than a *de minimis* way, which means negligible or inconsequential. It would be considered inconsequential for one or more lobbyists or foreign agents to serve on the board of an organization that is sponsoring travel, as long as the lobbyists or foreign agents are not involved in the trip. It is also permissible for a lobbyist to respond to a trip sponsor's request to identify Senate invitees with interest in a particular issue relevant to a planned trip. However, a lobbyist is not allowed to solicit or initiate communication with a trip sponsor, have control over which Senate employees are invited on a trip, extend or forward an invitation to a participant, determine the trip itinerary, or be mentioned in the invitation.

Example: A trip sponsor that is a § 501(c)(3) non-profit organization asks a lobbyist to recommend staffers who might be most interested in joining a trip to the U.S.-Mexican border. If a lobbyist knows a staffer who has a particular interest in the DEA's activities at the border, then providing that information (in light of the trip sponsor's request), in and of itself, would not exceed a *de minimis* level of participation, and would be permitted. However, it would not be permissible for the lobbyist to initiate contact with the trip sponsor to suggest that a particular Senate staffer be invited or forward an invitation to that staffer. Consult the instructions for question 9 to determine if the trip meets the lobbyist accompaniment standards.

9. **Lobbyist/agent of a foreign principal accompaniment standards:** Senate Members, officers, and staff may not accept privately-sponsored travel from an entity that retains or employs one or more federally-registered lobbyists or foreign agents unless one of the listed scenarios applies. *At any segment of the trip* means lobbyists may not accompany the Senate invitee for parts of the travel to and from the event (not at the event itself or the location being visited). *At any point throughout the trip* means lobbyists may not accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited, other than in a *de minimis* way. This is a broader prohibition than the *at any segment of a trip* standard.

"De minimis" exception: Both lobbyist/agent of a foreign principal "accompaniment" prohibitions include a *de minimis* exemption. *De minimis* means negligible or inconsequential. The mere coincidental presence of a lobbyist or foreign agent at an event would likely be considered *de minimis*. But in making the final determination, the Ethics Committee will consider the totality of the circumstances, including the amount of time lobbyists or foreign agents are present at the event; the amount of direct contact they have with Senate invitees; and the amount of control a trip sponsor has over their presence or contact with Senate guests. For example, if the trip includes attendance at an event considered widely-attended under Rule 35(1)(c)(18), the trip sponsor is unlikely to know all attendees present. Thus, it is likely to be permissible for such widely-attended events to include both a Senate guest and a lobbyist. Similarly, an organization cannot possibly know all the other passengers taking the same flight or other common carrier to a given destination. Accordingly, the sponsor does not need to certify that it knows for certain that no lobbyist or foreign agent will be on such a common carrier.

10. **If travel includes two overnight stays:** The Ethics Committee may approve two overnight stays for trips sponsored by an entity that employs or retains one or more lobbyists or foreign agents under certain conditions. Consult Committee regulations for additional information.
11. **An itinerary for the trip is attached to this form:** The Ethics Committee will not review the trip request without a detailed (hour-by-hour), complete and final itinerary for the trip. As a general matter, the Ethics Committee advises that each travel day contain a minimum of 6 hours of officially-related activities for Senate invitees.
12. **Briefly describe the role of each sponsor in organizing and conducting the trip:** A sponsor must have a significant role in organizing and conducting a trip and must have a specific organizational interest in the purpose of the trip.
13. **Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:** Provide a brief description of the stated mission of each sponsor and how it relates to the trip.
14. **Briefly describe each sponsor's prior history of sponsoring congressional trips:** Provide a brief discussion of the sponsor's history of sponsoring congressional travel. It is not necessary to list every trip.
15. **Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):** Provide a brief description of the educational activities performed by each sponsor. It is not necessary to list every individual activity; the description may be by kind or category of educational activity involved.
16. **Total expenses for each participant:** Indicate whether the figures provided are actual amounts or good faith estimates by checking the appropriate box. All trip expenses should be included. Expenses other than those for transportation, lodging, and meals must be individually listed and specified. Attach additional pages as necessary.

17. ***Congressional participation:*** For events that are arranged without regard to congressional participation (for example, annual meetings, conferences, seminars, and symposiums of trade associations, professional societies, business associations, and other membership organizations), the Ethics Committee may, but is not required to, allow Senate Members, officers, and employees to accept lodging and meal expenses that are commensurate with what is customarily provided to non-congressional attendees in similar circumstances. For events specifically arranged around congressional participation, lodging, meal expenses and other expenses must be "reasonable" in accordance with Ethics Committee regulations.
18. ***Reason for selecting the location of the event or trip:*** The location of the trip *must be related to its purpose*. A brief but detailed description of the reason for the selection of the location must be provided.
19. ***Name and location of hotel or other lodging facility:*** Include the exact name and address of the hotel or other lodging facility.
20. ***Reasons for selecting hotel or other lodging facility:*** Provide an explanation of the sponsor's rationale for selecting the particular lodging, include information such as proximity to the airport or site to be visited.
21. ***Describe how the daily expenses for lodging, meals, and other expenses provided to trip participant compare to the maximum per diem rates for official Federal Government travel:*** Where feasible and available, trip expenses for lodging and meals should generally be comparable to the government *per diem* rates. The circumstances surrounding a particular trip may legitimately require lodging and meal expenses to exceed these rates. Consult the Ethics Committee regulations for additional information.
22. ***Describe the type and class of transportation being provided:*** While coach or business-class fare may be accepted, first-class fare for any mode of transportation may be permitted only under limited conditions and only with specific prior written approval by the Ethics Committee. Transportation on a private or charter aircraft is not permitted for privately-sponsored travel under any circumstances.
23. ***Expenses for recreational activity or entertainment:*** The only recreational or entertainment activities that will be approved by the Ethics Committee are those that are provided to all attendees and are an integral part of an event.
24. ***List any entertainment that will be provided to, paid for or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:*** Entertainment expenses that are not provided to all attendees and deemed an integral part of the event will not be approved by the Ethics Committee.
25. ***Certification:*** Each sponsor of a trip should sign the form and certify that the information is complete and correct. Attach additional pages with the certification and signature block, as necessary, for each trip sponsor.

US Senate

Committee on Ethics

Attachments to Private Sponsor Travel Certification Form

Attachment 1 – Question #5 – Name and title of Senate invitees.

Name	Title	Affiliation
Michael Kulken	National Security Advisor	Senate Minority Leader Charles Schumer
Robert Leonard	National Security Advisor	Senate Minority Whip Richard Durbin
Patrick Day	Counsel	Senate Judiciary Committee
Dan Lips	Policy Director	Senate Homeland Security and Government Affairs Committee
Julie Klein	Professional Staff Member	Senate Homeland Security and Government Affairs Committee
Chris Cook	Professional Staff Member for Subcommittee on Homeland Security	Senate Appropriations Committee
Andy Olson	Senior International Finance Advisor	Senate Foreign Relations Committee

Attachment 2 – Question # 12 – Description of role of sponsor in organizing and conducting the trip

Software.org: the BSA Foundation is an independent and nonpartisan international research organization. This visit is an opportunity to share about the world's most innovative software companies and learn first-hand from leading industry experts about the industry's approach to cybersecurity. Software.org planned and organized all aspects of the trip, made lodging and travel arrangements, and corresponded with businesses involved to set up events and tours at each location. Software.org is the sole sponsor for this trip, including responsibility for covering cost of meals throughout the trip.

*The Senate Foreign Relations Committee (SFRC) will independently fund all travel costs and arrangements for Mr. Andy Olson. Software.org will purchase Mr. Olson's airfare and accommodations in a block with all other delegation participants, conferring a reduced rate. SFRC will reimburse the Foundation.

Attachment 3- Question # 13 – Description of stated mission of sponsor and how purpose of trip relates

Software.org: the BSA Foundation is an independent and nonpartisan international research organization that was launched in 2017 to educate policymakers and the broader public about the hugely positive impact that software has on our lives, our economy, and our society. With headquarters in Washington, DC, Software.org works to empower the workforce of the future and to help policymakers, stakeholders, and the technology industry look forward and prepare for the world of tomorrow.

In support of our policy agenda, Software.org is embarking on this trip as part of an ongoing effort to create more opportunities for education and providing hands-on experience to further congressional staff's understanding of the industry's approach to cybersecurity.

The trip to San Francisco will include unique visits to several global software companies. It is our goal that participants will gain greater insight into how the software industry is securing digital assets, innovating to adapt to the modern threat environment, and learn how public policy can play a role in enhancing our country's cybersecurity programs. This will be accomplished through site visits to the San Francisco and Silicon Valley locations of Adobe, Apple, DIU, IBM, Microsoft, Okta, Symantec, Workday including in-depth, on premises conversations with the company's senior cybersecurity experts.

We have invited staff who work in the Judiciary, Foreign Relations, Homeland Security and Government Affairs, and Appropriations committees as well as Leadership offices in order to provide them with an in-depth conversation on the industry's approach to cybersecurity.

This is Software.org's sixth Congressional trip. Software.org is positioned to educate Congressional policymakers on cybersecurity and the software, data, and application economy by providing them with an opportunity to visit software companies to engage in high-level discussions with industry leaders.

Software.org educates policy makers, stakeholders, and the general public at a global level through meetings and briefings, by developing and publishing studies and papers that explain policy and enforcement issues of interest to the software industry, by engaging the public through events and panels that reach wide audiences, and by partnering with leading organizations to support diversity, inclusion, and economic opportunity.

We selected the Holiday Inn Sunnyvale because the rate meets the per diem rate and there is no minimum night stay. During our trip, a city-wide event in San Francisco is increasing hotel prices to \$200-300 over the per diem rate and requiring the delegation to commit to a three-night stay. The Hyatt House Emeryville was chosen as lodging for the second night of travel because of its proximity to companies we will visit on the third day of travel and because its rate (\$299) was closest to per diem.

Daily expenses for meals and other expenses will be at or below per diem rates. During our trip, a city-wide event in San Francisco is increasing hotel prices to \$200-300 over the per diem rate and requiring the delegation to commit to a three-night stay. The Hyatt House Emeryville was chosen as lodging for the second night of travel because of its proximity to companies we will visit on the third day of travel and because its rate (\$299) was closest to per diem.

[illegible]